



Filing ID #10022246

# FINANCIAL DISCLOSURE REPORT

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## FILER INFORMATION

**Name:** Tracy Lyn Lovvorn  
**Status:** Congressional Candidate  
**State/District:** MA02

## FILING INFORMATION

**Filing Type:** Candidate Report  
**Filing Year:** 2018  
**Filing Date:** 05/15/2018

## SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Capital One Joint ⇒ Coca-Cola Bottling Co. Consolidated (COKE) [ST]	JT	\$1 - \$1,000	Capital Gains, Dividends	\$1 - \$200	\$1 - \$200
Capital One Joint ⇒ General Electric Company (GE) [ST]	JT	\$1 - \$1,000	Capital Gains, Dividends	\$1 - \$200	\$1 - \$200
Capital One Joint ⇒ Merck & Company, Inc. Common Stock (MRK) [ST]	JT	\$1 - \$1,000	Capital Gains, Dividends	\$1 - \$200	\$1 - \$200
Capital One Joint ⇒ Microsoft Corporation (MSFT) [ST]	JT	\$1 - \$1,000	Capital Gains, Dividends	\$1 - \$200	\$1 - \$200
Capital One Joint ⇒ Starbucks Corporation (SBUX) [ST]	JT	\$1 - \$1,000	Capital Gains, Dividends	\$1 - \$200	\$1 - \$200
Capital One Joint ⇒ Walt Disney Company (DIS) [ST]	JT	\$1,001 - \$15,000	Capital Gains, Dividends	\$201 - \$1,000	\$201 - \$1,000
Personal Business ⇒ Evolution Therapeutics LLC [OL]	JT	\$250,001 - \$500,000	Partnership	\$5,001 - \$15,000	Not Applicable

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
LOCATION: Grafton, MA, US DESCRIPTION: Private Outpatient Physical Therapy Clinic					
Primerica IRA ⇒ Invesco American Franchise Class A [MF]		\$1,001 - \$15,000	Tax-Deferred		
Primerica IRA ⇒ Invesco Asia Pacific Growth Fund - CI A [MF]		\$1,001 - \$15,000	Tax-Deferred		
Primerica IRA ⇒ Invesco Health Care Class A [MF]		\$1,001 - \$15,000	Tax-Deferred		
Primerica IRA ⇒ Invesco Mid Cap Growth Class A [MF]		\$1,001 - \$15,000	Tax-Deferred		
Primerica IRA ⇒ Invesco Small Cap Discovery Class A [MF]		\$1,001 - \$15,000	Tax-Deferred		
Real Property ⇒ Rental Property [RP]	JT	\$250,001 - \$500,000	Rent	\$15,001 - \$50,000	\$15,001 - \$50,000
LOCATION: Grafton, MA, US					
Real Property ⇒ Rental Property [RP]	JT	\$250,001 - \$500,000	Rent	\$15,001 - \$50,000	\$15,001 - \$50,000
LOCATION: Bel Air, MD, US					
Spouse Primerica IRA ⇒ Invesco Asia Pacific Growth Fund - CI A [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Spouse Primerica IRA ⇒ Invesco Diversified Dividend Fund - CI A [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Spouse Primerica IRA ⇒ Invesco Mid Cap Growth Class A [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Spouse Primerica IRA ⇒ Invesco Small Cap Discovery Class A [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Spouse Primerica IRA ⇒ Invesco Technology Fund Class A [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Spouse Vanguard Roth IRA ⇒	SP	\$1,001 - \$15,000	Capital Gains,	\$201 - \$1,000	\$201 - \$1,000

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
VTTHX [MF]			Dividends		
Spouse Wyman Gordon ⇒ VANGUARD TARGET 2035 [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		
UBS Joint ⇒ VBIRX [MF]	JT	\$15,001 - \$50,000	Capital Gains, Dividends	\$201 - \$1,000	\$201 - \$1,000
UBS Joint ⇒ VBT LX [MF]	JT	\$15,001 - \$50,000	Capital Gains, Dividends	\$201 - \$1,000	\$201 - \$1,000
UBS Joint ⇒ VEMAX [MF]	JT	\$15,001 - \$50,000	Capital Gains, Dividends	\$201 - \$1,000	\$201 - \$1,000
UBS Joint ⇒ VEXAX [MF]	JT	\$15,001 - \$50,000	Capital Gains, Dividends	\$201 - \$1,000	\$201 - \$1,000
UBS Joint ⇒ VGELX [MF]	JT	\$15,001 - \$50,000	Capital Gains, Dividends	\$201 - \$1,000	\$201 - \$1,000
UBS Joint ⇒ VGSLX [MF]	JT	\$15,001 - \$50,000	Capital Gains, Dividends	\$201 - \$1,000	\$201 - \$1,000
UBS Joint ⇒ VSBSX [MF]	JT	\$15,001 - \$50,000	Capital Gains, Dividends	\$201 - \$1,000	\$201 - \$1,000
UBS Joint ⇒ VTIAX [MF]	JT	\$15,001 - \$50,000	Capital Gains, Dividends	\$1,001 - \$2,500	\$1,001 - \$2,500
UBS Joint ⇒ VTSAX [MF]	JT	\$50,001 - \$100,000	Capital Gains, Dividends	\$1,001 - \$2,500	\$1,001 - \$2,500
Vanguard IRA ⇒ Vanguard Federal Money Market Fund [MF]		\$15,001 - \$50,000	Tax-Deferred		
Vanguard Joint Investment ⇒ VEIEX [MF]	JT	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Vanguard Joint Investment ⇒ VEXAX [MF]	JT	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Vanguard Joint Investment ⇒ VTIAX [MF]	JT	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Vanguard Joint Investment ⇒ VTSAX [MF]	JT	\$15,001 - \$50,000	Dividends	\$1 - \$200	\$1 - \$200
Vanguard Roth IRA ⇒ VTTHX [MF]		\$1,001 - \$15,000	Capital Gains, Dividends	\$201 - \$1,000	\$201 - \$1,000

\* Asset class details available at the bottom of this form. For the complete list of asset type abbreviations, please visit <https://fd.house.gov/reference/asset-type-codes.aspx>.

### SCHEDULE C: EARNED INCOME

Source	Type	Amount Current Year to Filing	Amount Preceding Year
Wyman Gordon	spouse salary	\$107,000.00	\$107,000.00
VNA First Choice	salary	N/A	\$44,000.00

### SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
JT	Ditech	August 2014	Mortgage on Grafton Rental Property	\$250,001 - \$500,000
JT	Chase	December 2008	Mortage on Bel Air Rental	\$250,001 - \$500,000

### SCHEDULE E: POSITIONS

None disclosed.

### SCHEDULE F: AGREEMENTS

None disclosed.

### SCHEDULE J: COMPENSATION IN EXCESS OF \$5,000 PAID BY ONE SOURCE

None disclosed.

### SCHEDULE A ASSET CLASS DETAILS

- Capital One Joint (Owner: JT)  
LOCATION: US
- Personal Business (Owner: JT)

LOCATION: US

- Primerica IRA
- Real Property (Owner: JT)  
LOCATION: US
- Spouse Primerica IRA (Owner: SP)
- Spouse Vanguard Roth IRA (Owner: SP)
- Spouse Wyman Gordon (Owner: SP)
- UBS Joint (Owner: JT)  
LOCATION: US
- Vanguard IRA
- Vanguard Joint Investment (Owner: JT)  
LOCATION: US
- Vanguard Roth IRA

## EXCLUSIONS OF SPOUSE, DEPENDENT, OR TRUST INFORMATION

**Trusts:** Details regarding "Qualified Blind Trusts" approved by the Committee on Ethics and certain other "excepted trusts" need not be disclosed. Have you excluded from this report details of such a trust benefiting you, your spouse, or dependent child?

☐ Yes ☒ No

**Exemption:** Have you excluded from this report any other assets, "unearned" income, transactions, or liabilities of a spouse or dependent child because they meet all three tests for exemption?

☐ Yes ☒ No

## CERTIFICATION AND SIGNATURE

☒ I CERTIFY that the statements I have made on the attached Financial Disclosure Report are true, complete, and correct to the best of my knowledge and belief.

**Digitally Signed:** Tracy Lyn Lovvorn , 05/15/2018